

Criminal/Traffic

Q1: Were you doing case processing work, clerical/administrative tasks, or something else?

- 01 Case related activities
- 02 Warrant processing
- 03 Jury administration (summoning, conducting orientation, payroll)
- 04 General customer service not related to a case
- 05 Clerical duties (e.g., phone and e-mail not associated with customer service, mail sorting and processing, maintenance of office equipment)
- 06 General administration (e.g., statistical and grant reporting, grant writing, fiscal work, maintaining cash drawer/till, local rules)
- 07 Supervisory, personnel, HR-related functions (e.g., timesheets, performance evaluations, conferring with supervisors and other staff)
- 08 Training/professional development
- 09 Work-related meeting
- 10 Work-related travel between court locations
- 11 Not working - Lunch, break
- 12 Not working - Vacation, sick leave, absent
- 99 Other, specify:

Q2: What type of case were you working on?

- 01 Criminal, Traffic
- 02 Civil
- 03 Probate, Conservatorship, Guardianship
- 04 Mental Health (e.g., LPS conservatorship, certification to detain and treat, mental competency)
- 05 Family Law
- 06 Juvenile Delinquency
- 07 Juvenile Dependency

Q3: What case type?

Felony

- 0101 Felony - Homicide
- 0102 Felony - All Other

Misdemeanor

- 0201 Misdemeanor - Traffic
- 0202 Misdemeanor - All Other

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Infraction

0301 Infraction- Traffic

0302 Infraction- All Other

Appellate Division Appeals

0401 Appeal of a misdemeanor or infraction case

0501 Habeas Corpus

0999 Task involves more than one of the above casetypes

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Q4: What were you doing?

- 01 Case Initiation and Case Processing
- 02 Calendaring and Caseflow Management
- 03 Case Monitoring and Enforcement
- 04 Legal and Professional Judicial Support (ADR, Investigative/Evaluative Services, Legal Research)
- 05 Courtroom Support (including work outside of courtroom)
- 06 Jury Management
- 07 Judgment, Post-judgment, and Appeals-related Activities
- 08 Fees and Payments/Financial Management
- 09 Records Management/File Maintenance
- 10 Self Help/General Assistance/Miscellaneous

Q5: What task were you doing?

01 Case Initiation and Case Processing

0101 New filing- receive/scan/create documents to start a new case; review filing for errors and reject as needed; create/prepare file; enter info into case management system; look up related cases; calendar hearings for new case; file documents

0102 Subsequent filing or petition - receive/scan/create documents to add to an existing case (including proof of service); review filing for errors and reject as needed; enter into case management system; look up related cases; calendar hearings; file documents

0103 Violation/modification of supervision (probation, mandatory supervision, PRCS, parole)- receive/scan/create documents to process a violation/modification; enter into case management system

0104 Transfer case in or out- receive/scan/create documents to start a new case; complete notification of transfer/vacate future hearing dates/update case management system

0105 Warrant processing (arrest or search warrants)- route to judge for signature/process warrant/update case management system/transmit to law enforcement to update into CLETS/file/recall warrant

0106 Citation batch processing- sort mail, batch, scan, prepare notice of defect, enter into case management system

0107 Notice to correct citation- enter into case management system, send notice, review for compliance

0108 Protective order or temporary restraining order- review documents, obtain signature of judicial officer, certify copies, enter into CLETS/CCPOR; file documents

0109 Bail- posting, exoneration, forfeiture

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0110 Prepare and issue forms related to death penalty cases- notice to reporter to prepare transcripts of preliminary hearing; notice to limited jurisdiction to prepare records

0199 Other, please specify:

02 Calendaring and Caseflow Management

0201 Set hearing date- assign case to a calendar

0202 Schedule continuance

0203 Pull/print/post calendars

0204 File preparation- review and prepare file for court

0205 File preparation- pull file, search for file, route to courtroom/other location

0206 Case preparation- prepare notes for judicial officer

0207 Tentative ruling- prepare, publish, post

0208 Schedule appearance of a law enforcement officer for a hearing/trial

0209 Schedule appearance of an in-custody defendant for a hearing/trial

0210 Arrange for telephonic or video appearance of parties

0299 Other, please specify:

03 Case Monitoring & Enforcement

0301 Monitor compliance with court orders

0302 Obtain and/or review reports from justice partners and/or service providers (e.g., criminal history, pre-sentence or supplemental investigation report)

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0303 Pretrial programs - collaborate with jail and probation to identify eligibility for pretrial release, ensure risk assessments are administered, monitor compliance with supervised release

0399 Other, please specify:

04 Legal and Professional Judicial Support (ADR, Investigative/Evaluative Services, Legal Research)

0401 Draft tentative rulings and perform other legal research

0402 Conference with judges and other court staff, observe hearings

0403 Provide settlement assistance

0404 Perform pro tem functions

0499 Other, please specify:

05 Courtroom Support (including work outside of courtroom)

0501 Docket/calendar management- take roll; check in parties; call parties; swear in witnesses; schedule hearings

0502 Minutes- take minutes or notes of court actions; enter into case management system

0503 Clerical support- correspondence; printing or copying documents for parties; other clerical work

0504 Clerical support- schedule interpreter

0505 Exhibits and subpoenaed documents- receive, mark, and/or file; meet with records team, review exhibits list

0506 Bench warrants- issue/recall bench warrant; update case management system

0507 Order/motion/judgment- prepare; process

0508 Electronic recording- operate equipment; do readbacks to clarify minutes; prepare audio record of minutes

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0509 Audit reporter transcripts for pre-trial hearings in death penalty cases- review for compliance with CRC 8.144, tag pages for corrections, notify reporter of corrections, process invoices and approve payments for transcripts

0599 Other, please specify:

06 Jury Management

0601 Voir dire- assist with jury selection, screening, questionnaire for a trial

0602 Jury trial- take attendance/check in jurors; sequestering; ordering food

0603 Preparing jury instructions

0699 Other, please specify:

07 Judgment, Post-judgment, and Appeals-related Activities

0701 Orders/judgment- pull file and prepare/review for conformity/process; update case management system

0702 Notice of entry of judgment or rejection of judgment- pull file and prepare/review/ process; update case management system; send out

0703 Default and uncontested judgment- pull file and prepare/review/process; update case management system

0704 Abstract of judgment/writs- prepare/process/transmit to DMV

0705 Trial by declaration- prepare notice of decision, enter into case management system, route to judicial officer

0706 Report to State Department of Justice, CLETS

0707 Jail/prison/hospital packet- prepare/process/send notice of commitment to CA Department of Corrections and Rehabilitation (CDCR)

0708 Post-judgment notifications - firearms relinquishment, firearms destruction, swabs for DNA, etc.

0709 Certificate of Rehabilitation and Pardon- process/review/research

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0710 Enter disposition or sentencing information into case management system, close out case

0711 Dismissal of case- certify, review documents, update case management system

0712 Appeal of case- prepare notices/update case management system/forward to judge/track remittiturs/track case through appeals process/manage exhibits

0713 Appeal of case- prepare and audit clerk's transcript, make corrections to record, prepare supplemental transcripts, request estimates and provide notice of cost of transcripts

0714 Publish/Post minute orders

0799 Other, please specify:

08 Fees and Payments/Financial Management

0801 Fees- collect document filing fee

0802 Payments- accept/process payments other than filing fees

0803 Payment plan- set up, track payment schedule for fees, fines, restitution as applicable

0804 Collections - process cases for collection; refer cases to collections; mail notices; track and report on status

0805 Trust account management

0899 Other, please specify:

09 Records Management/File Maintenance

0901 File management -file documents into casefiles; deliver/return files to shelves

0902 Imaging- scan, microfilm documents for a casefile

0903 Records request- look up case information; make copy of a record; redact; certify; make prior package; accept fee for document copies

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0904 Records sealing- review request; pull file; prepare and send letter to acknowledge compliance with sealing order; route case to storage; update case management system

0905 Records management- moving files to and from storage; purging old files; maintaining retention schedule

0906 Inactive case- research/close/purge

0907 Exhibits preservation, destruction

0999 Other, please specify:

10 Self Help/General Assistance/Miscellaneous

1001 Self-help- provide assistance (incl. by phone, mail, e-mail) to self-represented/pro per litigants

1002 General assistance- provide information or other assistance (incl. by phone, mail, e-mail) not described in other tasks

1003 General assistance- assist justice system partners with requests for documents, information for a case

1004 Data and statistical reporting- tabulate and compile stats to assess case status, progress, and outcomes

1099 Other, please specify:

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Q6: Is the task selected in #5 related to a hearing?

- 00 Not related to a hearing
- 01 Arraignment
- 02 Pre-preliminary hearing
- 03 Preliminary hearing
- 04 Pretrial hearing
- 05 Motion hearing
- 06 Bench Trial
- 07 Jury Trial
- 08 Trial de Novo
- 09 Sentencing hearing
- 10 Reclassification or resentencing hearing
- 11 Violation/modification of supervision (probation, mandatory supervision, PRCS) hearing
- 12 Parole revocation hearing
- 13 Ex parte hearing
- 14 Jurisdictional transfer hearing
- 15 Treatment review hearing
- 16 Felony appeal or appeal-related hearing (e.g., settling the record)
- 17 Misdemeanor or infraction appeal or appeal-related hearing (e.g., settling the record)
- 18 Other post-judgment hearing
- 99 Other, please specify:

Q7: Was the case processed or task performed associated with a collaborative justice court, specialized program, or special case characteristics?

- 00 No, not associated with a collaborative justice court, specialized program, or special case characteristics
- 01 Death penalty/capital case
- 02 Life without parole (LWOP) case
- 03 Drug court
- 04 DUI court
- 05 Domestic violence court
- 06 Elder court
- 07 Mental health or behavioral health court

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08 Reentry court

09 Homeless or community court

10 Veterans or stand-down court

11 Informal juvenile and traffic program

99 Other collaborative justice court/specialized program/case characteristics, please specify: